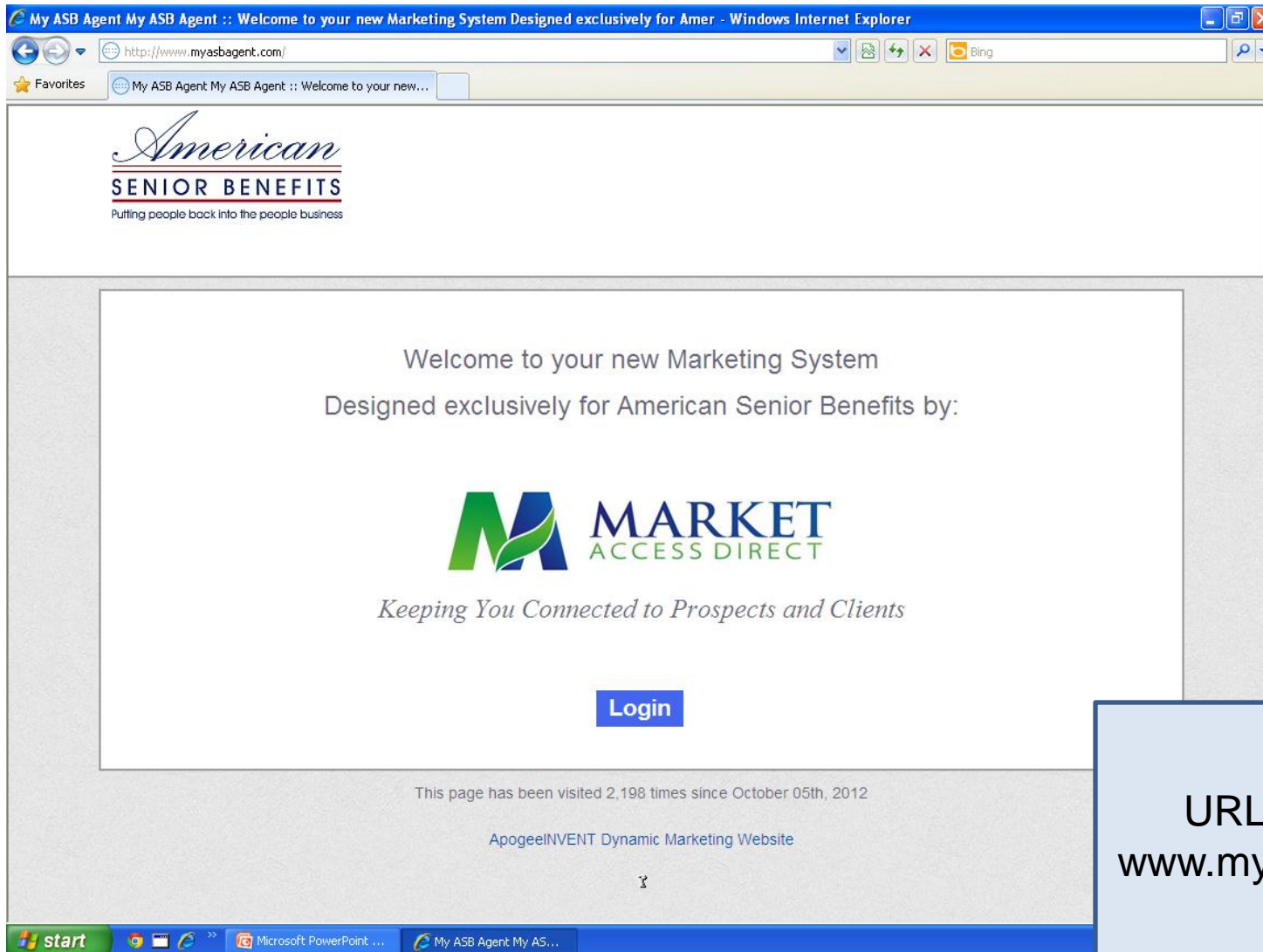


Getting Started

- Logging On
- System Overview

The Contact Management System



URL address is:
www.myasbagent.com

Logon to the System

My ASB Agent Login : Welcome to My ASB Agent User Name Password Remember me - Windows Internet Explorer

http://www.mysbagent.com/login

My ASB Agent Login : Welcome to My ASB Agent User...

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Welcome to My ASB Agent

User Name

Password

☐ Remember me

[Forgot your password?](#)

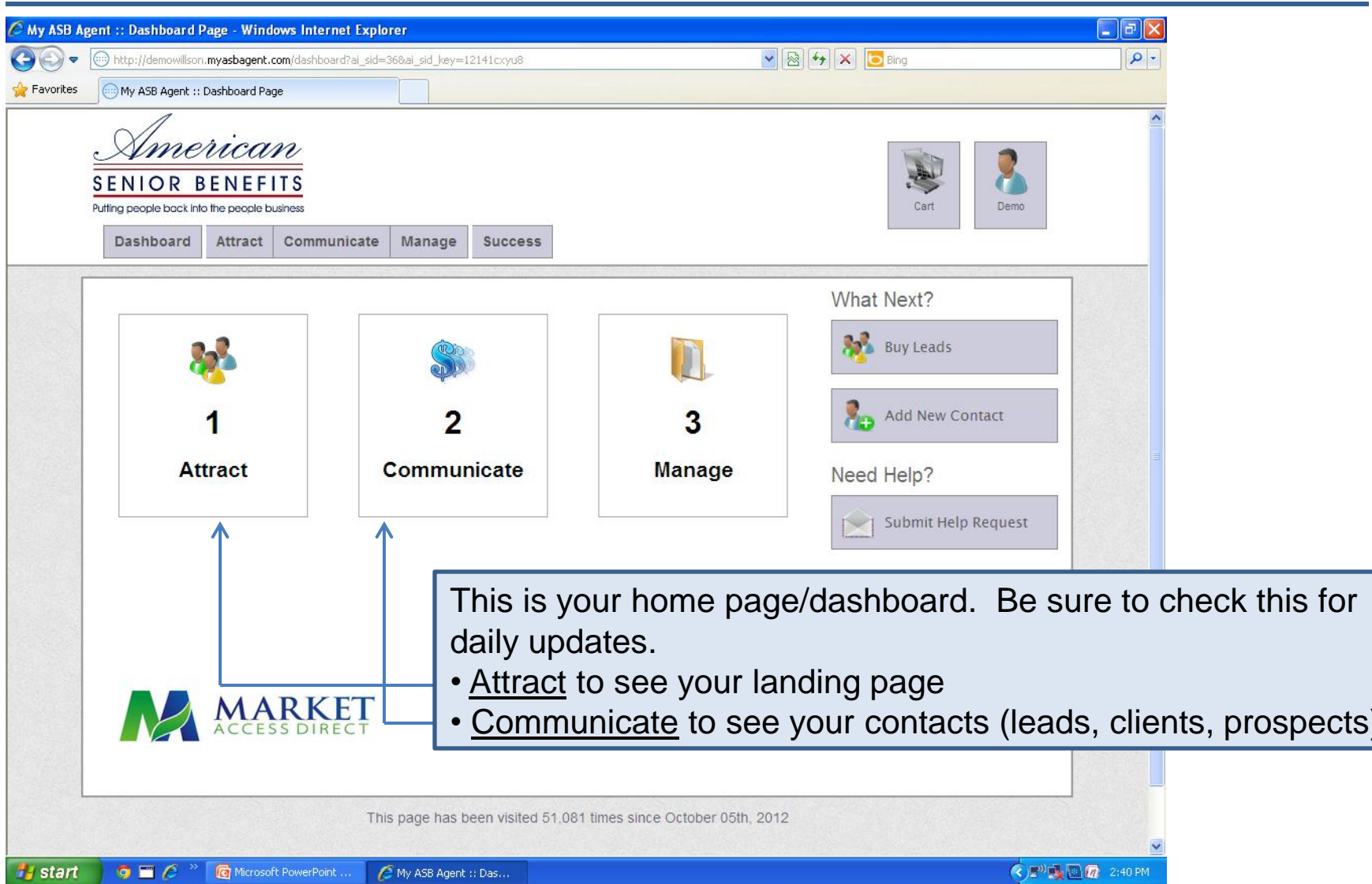
Login

This page has been visited 3,313 times since October 05th, 2012

start Microsoft PowerPoint ... My ASB Agent Login : ... 2:36 PM

The first time you log in use **Intro123** as your password. You will be prompted to change this immediately.

Functionality



My ASB Agent :: Dashboard Page - Windows Internet Explorer

http://demowillson.myasbagent.com/dashboard?ai_sid=368&ai_sid_key=12141cxyu8

My ASB Agent :: Dashboard Page

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Dashboard Attract Communicate Manage Success

Cart Demo

1
Attract

2
Communicate

3
Manage

What Next?

Buy Leads

Add New Contact

Need Help?

Submit Help Request

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2:40 PM

This is your home page/dashboard. Be sure to check this for daily updates.

- Attract to see your landing page
- Communicate to see your contacts (leads, clients, prospects)

Access Personalized Web Page



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Invite Contacts
Update Homepage

1 Attract 2 Communicate 3 Manage

What Next?
Add New Contact

Need Help?
Submit Help Request

To view your landing page click on update homepage. Note you may not edit the copy in the bio section. Please send all requests for updating to setup@marketaccessdirect.com. This ensures compliance approval for your page.

This page has been visited 483,779 times since October 05th, 2012


Agent Web Page

American Senior Benefits - Bob Mueller, Jr. - Windows Internet Explorer

http://www.mysabagent.com/profile?te_class=user_profiles&te_mode=view&te_key=36&ai_skin=full_pai

American Senior Benefits - Bob Mueller, Jr.

ASB Service Spotlight

 **Bob Mueller, Jr.**
Insurance Agent

PHONE 402-981-9055
3345 N 107th Street
Omaha Nebraska 68134

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robertmueller@mysabagent.com robertmueller.mysabagent.com

At American Senior Benefits, we're dedicated to helping America's growing senior population. We start by knowing Medicare inside and out. We work to help seniors get the coverage they need to stay healthy and secure. We can also help them find financial instruments to stay financially secure. We're proud of what we do and happy to help. We look forward to providing the assistance and service you need.

Bob Mueller Jr. has over 11 years of experience working with seniors to help their families achieve financial security from unforeseen loss due to Medical, Long Term Care, and Final Expenses. His goal is to help his clients ease the financial burden that these expenses can create.

Bob was born, raised and attended college in Lincoln, majoring in Marketing. He and his wife Laura live in Omaha where they are raising their three beautiful children: Megan, Clinton and London.

CONTACT BOB TODAY
If you have any questions about our plans or Medicare in general, give Bob a call. He'll be glad to offer useful information, insights, and advice.

PHONE 402-981-9055 robertmueller@mysabagent.com robertmueller.mysabagent.com

INFORMATION CENTER

General Medicare



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start Norton Internet Secu... Workspace Webmail ... American Senior Bene... Microsoft PowerPoint ... 1:08 PM

Contact Manager

My ASB Agent :: Dashboard Page - Windows Internet Explorer

http://demowillson.myasbagent.com/dashboard?ai_sid=368&ai_sid_key=12141cxyu8

My ASB Agent :: Dashboard Page

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Contact Manager

1 Attract

2 Communicate

3 Manage

What Next?

- Buy Leads
- Add New Contact

Need Help?

- Submit Help Request

MARKET ACCESS DIRECT

This page has been visited 51,081 times since October 05th, 2012

start Microsoft PowerPoint ... My ASB Agent :: Das...

2:52 PM

To view your contacts click communicate and then contact manager

Contact List View



Dashboard Attract Communicate Manage Success

Contact Manager

All Contacts

My Contacts

Unowned

2 Results For ☐ Tags Exclude: email ☐ Owner: Agent Fake ☐ Status: Mlead - mail lead

<input type="checkbox"/>	First Last	Last Contact	Next Contact	Last Action: Note
<input type="checkbox"/>	Temp Phone Email City Zip County Owner	Last Updated Status : Actions Taken		
<input type="checkbox"/>	PATRICIA NELSON 2616 S PATTERSON ST SIOUX CITY, IA 51106 maudet@gmail.com (712)587-1035 Owner: agent fake	3 weeks ago 3 weeks ago Mlead - mail lead : Email Sent(2), Email		New: test with new
	new import intro email mgrltr ms			
	PAT GRANT 7333 GROVER ST OMAHA, NE 68124 newemail@gmail.com 7/4/1939 Owner: agent fake	2 days ago 2 weeks ago Mlead - mail lead : Broadcast Email(2), Email Sent(3), Email, Message(2)		Email Sent: The system sent this email: "Free consultation"
	import broadcast email intro email mgrltr message ms life review ms guide life			

Search

[Search](#)

Search by Tag ☐

Exclude by Tag ☐

email

Take Action

- [Add New Contact](#)
- [Invite Contacts](#)
- [Search Contacts](#)
- [Search "Mail Leads"](#)
- [My Contacts](#)
- [UnOwned Contacts](#)

Actions for Selected

Tags

NEW

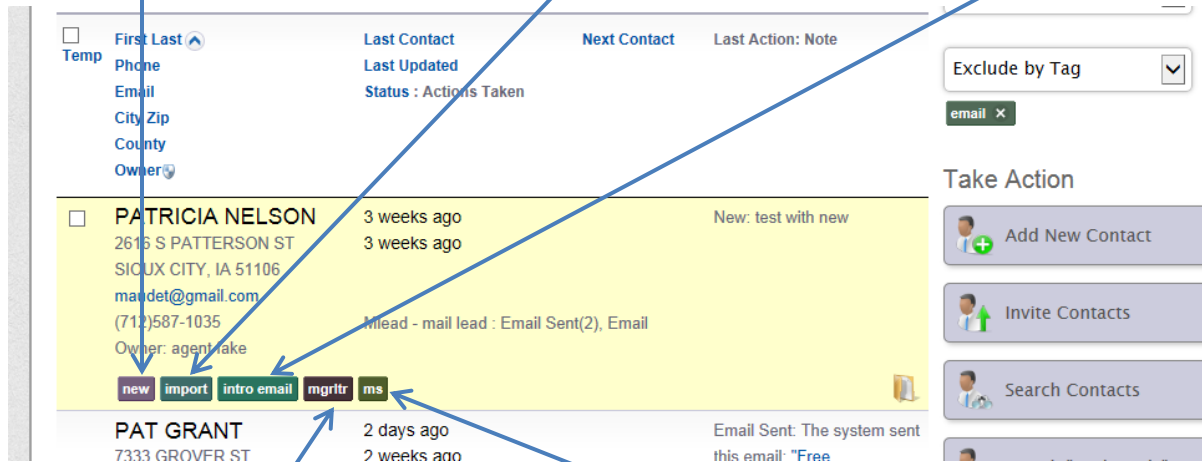
The “new” tag indicates that the lead has not yet been viewed

IMPORT

This tag means the lead was uploaded into the system and not manually added

INTRO EMAIL*

This tag will be assigned when the name has an email address and has received the Agent Intro Email



The screenshot shows a lead management interface. At the top, there are columns for 'First Last', 'Phone', 'Email', 'City', 'Zip', 'County', and 'Owner'. Below this, a contact record for 'PATRICIA NELSON' is displayed. The record includes her address (2616 S PATTERSON ST, SIOUX CITY, IA 51106), email (mandet@gmail.com), and phone number ((712)587-1035). The record is highlighted in yellow. Below the contact information, there are several tags: 'new', 'import', 'intro email', 'mgrltr', and 'ms'. Arrows from the text boxes point to these tags. To the right of the contact record, there are fields for 'Last Contact', 'Last Updated', 'Next Contact', and 'Last Action: Note'. Below these fields, there is a 'Status: Actions Taken' section. On the right side of the interface, there is a 'Take Action' section with buttons for 'Add New Contact', 'Invite Contacts', and 'Search Contacts'. There is also an 'Exclude by Tag' dropdown menu with 'email' selected.

MGRLTR

This tag means the lead was mailed a Manger Thank You letter within 48 hours of receipt

Lead Type

Tags are added for automated communications, initial description of the contact and as added by you.

Status and Activities

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Jim

Contact Manager

2 Results For ☐ Tags Exclude: email ☐ Owner: Agent Fake ☐ Status: Mlead - mail lead

<input type="checkbox"/>	First Last	Last Contact	Next Contact	Last Action: Note
<input type="checkbox"/>	Temp Phone Email City Zip County Owner	Last Updated Status : Actions Taken		
<input type="checkbox"/>	PATRICIA NELSON 2616 S PATTERSON ST SIOUX CITY, IA 51106 maudet@gmail.com (712)587-1035 Owner: agent fake new import intro email mgrltr ms	3 weeks ago 3 weeks ago Mlead - mail lead : Email Sent(2), Email		New: test with new
<input type="checkbox"/>	PAT GRANT 7333 GROVER ST OMAHA, NE 68124 newemail@gmail.com 7/4/1939 Owner: agent fake import broadcast email intro email mgrltr message ms life review ms guide life	2 days ago 2 weeks ago Mlead - mail lead : Broadcast Email(2), Email Sent(3), Email, Message(2)		Email Sent: The system sent this email: "Free consultation"

Actions for Selected

Search

Search

Search by Tag ☐

Exclude by Tag ☐

email x

Take Action

Add New Contact

Invite Contacts

Search Contacts

Search "Mail Leads"

My Contacts

UnOwned Contacts

STATUS

The status gets added when imported but can be updated on the detail screen. You should use status.

ACTIVITIES

This category tracks contacts – emails and calls.

Viewing Your Lead Card

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Jim

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Contact Manager

2 Results For Tags Exclude: email Owner: Agent Fake Status: Mlead - mail lead

☐ Temp
☐ First Last
☐ Phone
☐ Email
☐ City Zip
☐ County
☐ Owner

☐ **PATRICIA NELSON** 3 weeks ago
 2616 S PATTERSON ST 3 weeks ago
 SIOUX CITY, IA 51106
 maudet@gmail.com
 (712)587-1035
 Owner: agent fake
 Mlead - mail lead : Email Sent(2), Email
 new import intro email mgrtr ms

☐ **PAT GRANT** 2 days ago
 7333 GROVER ST 2 weeks ago
 OMAHA, NE 68124
 newemail@gmail.com
 7/4/1939
 Owner: agent fake
 Mlead - mail lead : Broadcast Email(2), Email Sent(3), Email, Message(2)
 import broadcast email intro email mgrtr message ms life review ms guide life

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☒ **Yes, I would like to receive the Free Guide**
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 Lincoln, NE 68516-1718
 Please print: Birthdate 04 / 30 / 1948 Phone 402-452-5652
 Email (optional): _____
 Not affiliated with or endorsed by any government agency.
 052310006400012

Actions for Selected

If you click the folder icon the contents of your file folder are available to view. Leads are placed in this folder.

Contact Details & Collecting Info

Manage Contact

First

Last

Company

Email

Phone

Mobile

Address

City

State

Postal

Spouse

County

Time Zone

Anytime

Birth

Insurance

Premium\$

From File Import:
KNOWLEDGE LINK
NUMBER: "000533494310006"
ImageFile:
C:simpleindexOutput00533494310006
.p

Last Contact
2 days ago

Last Update
2 weeks ago

Source

Owner

Temperature

Type

Status

Follow Up

Tags

import × broadcast email ×

intro email × mgrtr × message ×

ms × life review × ms guide ×

life ×

Take Action

Save

Save & Go To Next

Cancel

Quick Email

Email Lists / Drip Emails

Manage Files

Need Help?

Submit Help Request

DETAILS ON CONTACT
collect email address.
Any word in the notes
section can be searched.

Contact Details & Collecting Info

Manage Contact

First Last

Company

Email

Phone

Mobile

Address

City State

Postal Spouse

County

Time Zone

Birth

Insurance

Premium\$

From File Import:
KNOWLEDGE LINK
NUMBER: "000533494310006"
ImageFile:
C:simpleindexOutput00533494310006
.p

Last Contact
2 days ago

Last Update
2 weeks ago

Source
Prospect
Lead
No Answer
Not Set
Needs Analysis
TOL - Take Off List
T-65
RLead - Referral Lead
Orphan
Client
Referral
NonResponder

Owner

Temperature

Type

Status
Mlead - mail lead
Alead - agent lead
Ilead - internet lead
Closed - won
Appointment Set

Follow Up

Tags
Add Tag...

import x broadcast email x

intro email x mgrtr x message x

ms x life review x ms guide x

life x

Take Action

Save

Save & Go To Next

Cancel

Quick Email

Email Lists / Drip Emails

Manage Files

Need Help?
Submit Help Request

STATUS

The status gets added when imported but can be updated on the detail screen. Use status.

Contact Details & Collecting Info

Manage Contact

First Last

Company

Email

Phone

Mobile

Address

City

Postal

County

Birth

Insurance

Premium\$

From File Import:
KNOWLEDGE LINK
NUMBER: "000533494310006"
ImageFile:
C:simpleindexOutput00533494310006
.P

Last Contact
2 days ago

Last Update
2 weeks ago

Source

Owner

Temperature

Type

Status

Follow Up

Example: tomorrow 3:15 pm

Tags

import x

intro email x

ms x

life x

broadcast email x

mgrtr x

life review x

message x

ms guide x

Take Action

Save

Save & Go To Next

Cancel

Quick Email

Email Lists / Drip Emails

Manage Files

Need Help?

Submit Help Request

Notes

AARP Medicare Complete HMO
AARP Medicare Complete PPO
AARP Medicare Complete PFFS
AARP United Health Care
Aetna
AFLAC
American Continental
American Republic
Americo
Arlic
Assured Life
Avera Select
Bankers Fidelity
Bankers Life And Casualty
Blue Cross Blue Shield
Blue Cross Blue Shield Blue
Central States
Care Improvement Plus
Colonial Penn
Continental Life
Coventry HMO
Coventry PPO
EPIC Life
Equitable Life
Family Life
Foresters Life
Forethought
Geisinger
Gerber
Globe Life

Data Capture: Be sure to ask on each and every call who the contact's Medicare Provider is and what they pay. See Best Practices in Success Tan